



**The Columbia River/Willamette Valley
2003 Combined Federal Campaign**

Campaign Coordinator Training Packet

August 19, 2003

LFCC

Ron Johnson, Executive Director
Oregon Federal Executive Board
1220 SW 3rd Avenue, Suite 1776
Portland, OR 97204-2623
Ph: 503-326-2060
Fax: 503-326-2070
rjohnson@pcez.com

Oregon FEB

Jeff Sargent, Management Analyst
Oregon Federal Executive Board
1220 SW 3rd Avenue, Suite 1776
Portland, OR 97204-2623
Ph: 503-326-3030
Fax: 503-326-2070
jsargent@pcez.com

CFC Support

Nancie Pruitt, CFC Specialist
Oregon Federal Executive Board
1220 SW 3rd Avenue, Suite 1776
Portland, OR 97204-2623
Ph: 503-226-9384
Fax: 503-226-9554
Nancie_pruitt@pcez.com

Principal Combined Fund Org.

Shelah Hanson, Dev. Officer
United Way of the Columbia-Willamette
619 SW 11th Avenue, Suite 300
Portland, OR 97205-2646
Ph: 503-226-9341
Fax: 502-226-9554
shelahh@unitedway-pdx.org



The Columbia River/Willamette Valley 2003 Combined Federal Campaign

2003 COMBINED FEDERAL CAMPAIGN (CFC) COORDINATOR TRAINING AGENDA

Thursday, August 19th

9:00 a.m.	<u>Welcome</u> <ul style="list-style-type: none">- The Combined Federal Campaign - in a “nutshell” and why CFC Coordinators are critical to the CFC- Introduction of CFC Coordinators <u>Remember, people support people they know and like so start getting “personal” in your introductions!!!</u>	<u>Ron Johnson</u> <ul style="list-style-type: none">- LFCC –Local Federal Coordinating Committee <u>CFC Coordinators</u>
	<u>Processing Contributions</u> <ul style="list-style-type: none">- CFC Pledge Form and Report Envelope- CFC Fund-Raiser Contributions	<u>Nancie Pruitt, Shelah Hansen and Jeff Sargent</u> <ul style="list-style-type: none">- CFC Leadership Team
	<u>Why Support Charities through the CFC?</u>	<u>2003 CFC Video</u>
	<u>BREAK</u>	
	CFC Brochure(s), Web Page, searchable database, Annual Report and Campaign Celebration plans	<u>Jeff Sargent</u>
	<u>Making the Ask (only 33% make contributions)</u> <ul style="list-style-type: none">- CFC Coordinator Presentations- Agency Head Endorsement- Charity Representative Visits/Presentations	<u>All Participants</u>
	<u>Answering Unanswered Questions</u>	<u>Nancie, Jeff, Shelah</u>
	<u>Resources available to CFC Coordinators</u>	<u>Nancie, Shelah, Jeff</u>
11:00	<u>Adjourn</u>	<u>Jeff Sargent</u>

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Organization Chart

Kay Cole James, Director

Oregon Federal Executive Board

Federal Leaders

Non-profit organization
or federation
(United Way of the
Columbia-Willamette)

OPM

**Local Federal
Coordinating Committee
(LFCC)**

**Leadership
Cabinet**

**Principal Combined Fund
Organization (PCFO)**

Regulations, timelines, guidance
National list, final appeals, audits

Approve budget
Hire manager (PCFO)
Review local applications
Oversight

Visible leadership
Campaign decisions
Liaison to Agency Executives

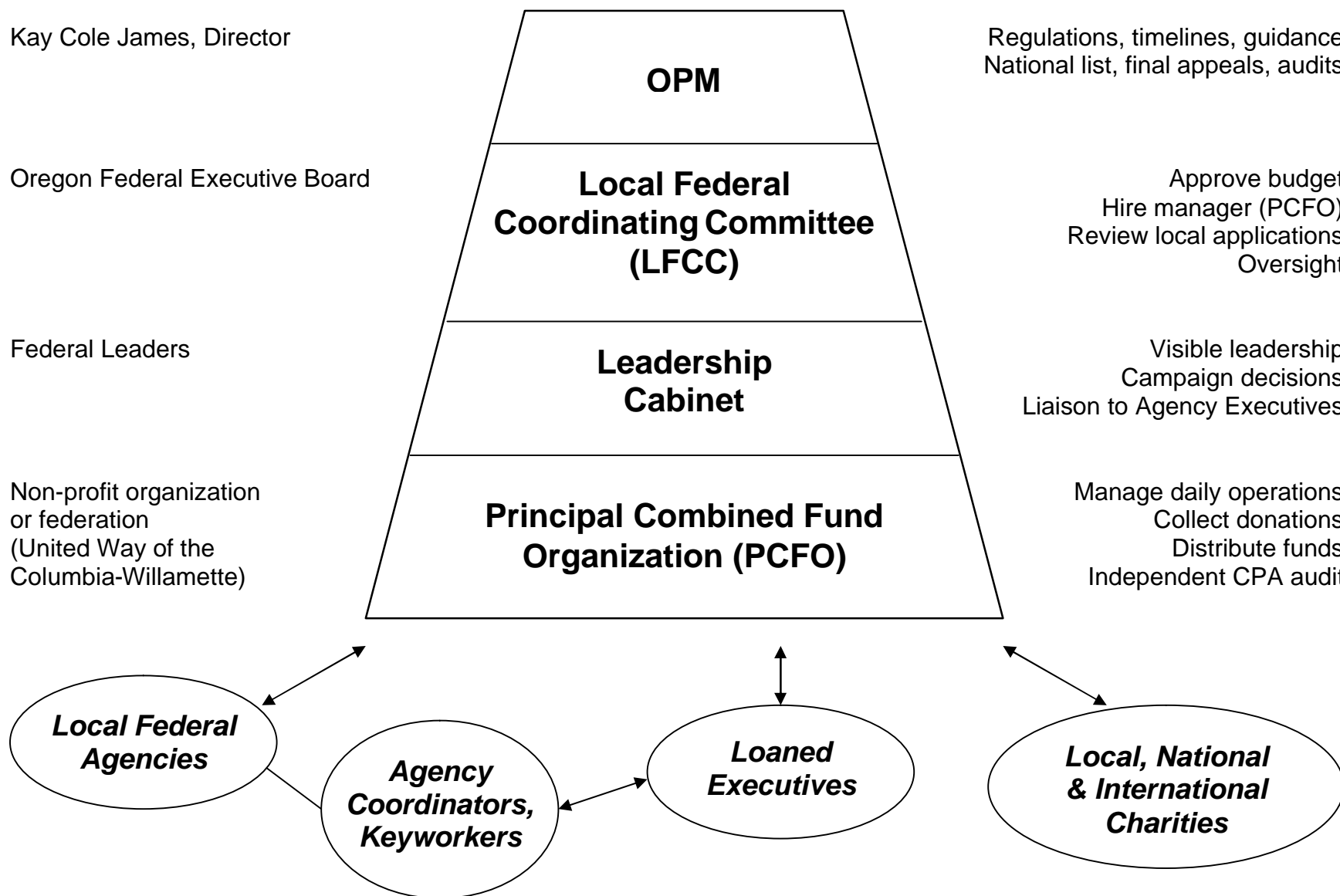
Manage daily operations
Collect donations
Distribute funds
Independent CPA audit

**Local Federal
Agencies**

**Agency
Coordinators,
Keyworkers**

**Loaned
Executives**

**Local, National
& International
Charities**





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CFC PLEDGE FORM PROCESSING SUGGESTIONS

The following procedures will help make the processing of CFC pledges much more efficient, thus minimizing our audit time and maintaining our low overhead costs!

Pledge Forms:

1. When collecting, please separate cash & check pledges, payroll deduction and fundraising cash & checks into separate bundles.
2. Please ask donors to print their name, federal agency, four digit codes and all other information **CLEARLY** on their pledge form. Donors should be encouraged to use four digit codes to designate contributions to specific charities. Undesignated contributions will be divided and distributed to every charity that are designated by the nearly 7,000 donors in our local campaign (nearly 1000 charities were designated in 2002).
3. Please ensure that the amount indicated as total deducted from payroll and the total of designations to charitable organizations are equal.
4. Instruct donors that they should use the four-digit codes **ONLY** from the 2003 CFC booklet. Codes may change from year to year.
5. If donors are pledging by payroll deduction, the **MUST** sign their form.
6. If donors wish to be acknowledged, they must write in their home address and/or e-mail address. Please verify that they have printed **CLEARLY** as well.
7. For fundraising dollars, fill out a separate pledge form and write in "FUNDRAISER" across the top along with your agency name, the total dollars on the cash/check line, and to what organization(s) the dollars are to be designated.
8. If an organization is using the HR-Links on-line pledging system, you do not have to also submit pledge forms.

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Report Envelopes:

1. Please ensure that the totals written on the cover of the report envelope for cash & checks, payroll deduction and fundraising dollars match the envelope contents.
2. Do not seal the envelope until a CFC staff person has a chance to review the contents as well. Agency Coordinators, please print your name and phone number on the front of the envelope, then you and the CFC staff person can both sign the envelope before sealing it.

Other:

Please fax (503-226-9560) or e-mail to Lenny Logan at United Way (LennyL@unitedway-pdx.org) the name of your federal agency, the primary contact in your Payroll Department, and a sample of one of your office's payroll checks with your agency code visible (you may black out any personal information).

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PCFO Address: 619 SW 11th Ave., #300, Portland, OR 97205 (503) 226-9341

CFC Campaign
Number**0728****ATTENTION PAYROLL OFFICES:**Only use this number to identify the
local campaign

PRINT NAME (LAST)	FIRST	MIDDLE INITIAL	<input type="checkbox"/> CIVILIAN <input type="checkbox"/> MILITARY	FEDERAL ORGANIZATION	UNIT/DIVISION AND PAYROLL OFFICE
WORK ADDRESS & ZIP CODE				WORK PHONE	SOCIAL SECURITY NUMBER

CONTRIBUTION: Fill in the blank showing the amount of your payroll allotment, cash or check contribution.
Write in the total of your annual contribution in the space provided.

CONTRIBUTION	AMOUNT	INTERVAL	TOTAL GIFT	FOUR DIGIT AGENCY CODE	ANNUAL AMOUNT
MILITARY PAYROLL		X 12 months	\$		
CIVILIAN PAYROLL		X 26 pay periods	\$		
OTHER \$ (cash/check payable to CFC)					

CFC Organizations do not provide goods or services in whole or partial consideration for any
contributions made to the organizations via this pledge card.DESIGNATED GIFTS: To designate one or more charities or federated groups
that appear on the list provided, fill in the charity or federation identification
number(s) and dollar amounts here.**PLEASE CHECK ONE BOX**

- ☐ I do want my name and address released to the voluntary organization(s) I have designated.
MY HOME ADDRESS IS: (My name will not be released unless this box is filled out completely.)
STREET: _____
CITY: _____ STATE: _____ ZIP CODE: _____
- ☐ I do want my home e-mail address and name released to the voluntary organization(s) I have designated.
My home e-mail address is: _____
- ☐ I do NOT want my name and address released to the voluntary organization(s) I have designated.

PAYROLL DEDUCTION AUTHORIZATION

I hereby authorize any agency of the United States Government by which I may be employed during 2004 to deduct the amount(s) shown above from my pay each pay period during the calendar year 2004 starting with the first pay period that begins in January and ending with the last pay period that begins in December, and to pay the amount(s) so deducted to the Combined Federal Campaign shown above. I understand that this authorization may be revoked by me in writing at any time before it expires.

SIGNATURE: _____ DATE: _____



The Columbia River/Willamette Valley 2003 Combined Federal Campaign

COMBINED FEDERAL CAMPAIGN FACT SHEET

- ✍ The CFC was founded in 1961, by order of President Kennedy, as the only official means of soliciting funds for charitable causes from Federal employees. Since 1982 the U.S. Office of Personnel Management (OPM) and Local Federal Coordinating Committees (LFCC) have administered the CFC.
- ✍ The Columbia River/Willamette Valley CFC serves over 20,000 Federal employees in 21 counties:
Oregon: Benton, Clackamas, Columbia, Gilliam, Hood River, Jefferson, Lincoln, Linn, Marion, Multnomah, Polk, Sherman, Wasco, Washington, Wheeler, Yamhill
Washington: Clark, Cowlitz, Klickitat, Skamania, Wahkiakum
- ✍ Federal employees at the Office of Personnel Management and the Local Federal Coordinating Committee, led by the Oregon Federal Executive Board, approve all charities that apply to the CFC so that only those that meet its high standards can participate.
- ✍ There were 388 local charities listed in the 2002 Columbia River/Willamette Valley CFC booklet and 1,862 total charities to choose from, including national and international organizations.
- ✍ In 2002 the Columbia River/Willamette Valley CFC raised \$1.475 million, an increase of 5.1% from the previous campaign. The participation rate was 31.6%, with donations from 6,464 of the approximately 20,400 federal employees in the region. CFC participation nationally averages 37%.
- ✍ The CFC sends almost all of what it collects to the charities that provide services to people, spending only a small percentage on administrative costs (6.7% in 2002).
- ✍ The local 2003 campaign period runs from Sept. 15 – Dec. 15. Federal agencies are encouraged to complete their campaigns by Nov. 21st, to allow for pledge processing.
- ✍ CFC contributors are encouraged to designate contributions to specific charities using the assigned four digit codes. Contributions that are not designated will be distributed to all charities that receive designated contributions. In 2002 an undesignated contribution would have been shared among 1000 charities. Distributing one person's contribution to 1000 charities significantly increases the administrative costs of the CFC!

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COMBINED FEDERAL CAMPAIGN – KEY MESSAGES

- ✍ The Combined Federal Campaign is yours as a Federal employee. It succeeds solely based upon your participation and support. It does not belong to the Federal government, the Principal Combined Fund Organization, or to the charitable organizations that benefit from it.
- ✍ Workplace giving has advantages. Through payroll deduction you can give more and have a small amount deducted each pay period.
- ✍ The charities you support through the CFC provide services to people in need, animals and our environment in the hopes of building healthier communities.
- ✍ You can direct your support to charities that work on something you care deeply about. We strongly encourage you to designate your gift, using the four-digit codes found in the booklet. Charities not listed in the booklet cannot receive designations through the CFC.
- ✍ Especially in more difficult economic times, your neighbors, fellow Federal employees and the global community needs your support.
- ✍ When you give through the CFC, charities have to spend less on marketing and fundraising to individuals, thus it helps lower their overhead and enable them to spend more on their services. Plus, if you do not wish to receive the multiple solicitations that might follow a direct gift, you can choose on your CFC pledge card not to be acknowledged by those to whom you give.
- ✍ The CFC sends almost all of what it collects to the charities that provide services, spending only a small percentage on administrative costs (6.7% in 2002).
- ✍ Federal employees at the Office of Personnel Management and the Local Federal Coordinating Committee in Portland check approve all charities that apply to the CFC so that only those that meet national standards can participate.
- ✍ The Combined Federal Campaign has been around a long time (since 1961) and has a proven track record for efficiency.
- ✍ Every dollar makes a difference!

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CAMPAIGN ELEMENTS THAT MAY WORK FOR "YOU"

Secure an endorsement from the Agency Director (memo, email message, personal comments)

Set a campaign goal and track the results (personally "ask" every employee and give pledge form)

Establish a concentrated campaign period (1-2 weeks)

Establish a team to assist you with the campaign so that everyone can be personally "asked"

Conduct employee meetings to energize the campaign and inform employees about the CFC

Invite charity speakers to the employee meetings to share their stories about the impact of the CFC contributions, or arrange site visits for Federal employees to local charities. Share your own story about why the CFC is important to you and/or why you contribute.

Review the benefits of giving through the CFC – payroll deduction, charities reviewed by LFCC, employees giving back to the community, etc.

Include incentives and fundraising events to encourage participation - make the campaign FUN!

Be prepared to answer questions about the CFC even if it simply means referring the person to one of the people listed on the bottom of this page.

Say "THANK YOU." Thank all employees for their time and consideration. This can be done personally or through your agency's communication channels (e-mail, bulletin boards, etc.)

Share the final results of your campaign with all employees.

Have fun and challenge yourself to learn and use new skills.

Remember, only about 33% of all employees contribute to charities through the CFC. Of those that don't, most say that they were not personally asked to do so. Try to make a "personal" ask.

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The Columbia River/Willamette Valley 2003 Combined Federal Campaign

DATE: September 2003

TO: All Employees
FROM: Director Crockett

SUBJECT: 2003 Combined Federal Campaign (CFC)

Thank you for your generous support of the Combined Federal Campaign. This year's CFC at our office will begin (date). Our Campaign Chairperson, (name), has added some exciting new elements to the campaign that will make it both more informative and fun. I encourage employee meetings and creative fundraisers to enhance our efforts. Our goal this year is to increase employee participation to _____%, and every donor and dollar makes a difference.

We never know when a friend, family member, the environment or we ourselves may suddenly need help. With the CFC, those organizations will be there for us. During our campaign, you will receive information on how you can be a part of the CFC. Please review the campaign booklet, as there is bound to be an organization that will connect you with your community. With over 1,800 participating charities, the strength of the CFC is choice.

There is a continuous array of issues that cry for help, and we all have a "responsibility" to respond. Our community and world count on the support of those of us dedicated to freedom and compassion. I fully endorse your involvement in the 2003 Columbia River/Willamette Valley Combined Federal Campaign.

Thank you for your consideration.

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